EX.010.022 - Authorize Users/Delegate Entry Authority (Core)

Purpose	• Identify the purpose of delegating entry authority to others. • Identify how individual users may delegate entry authority to other users of their choice. • Authorize users/delegate entry authority in the Core system.
Description	This topic demonstrates how to authorize users, or delegate entry authority, in the Core system. Essentially, 'Authorizing an Expense User' and 'Delegating Entry Authority' mean the same thing, and they are both accomplished on the same page. This functionality permits an employee and other User IDs of their choosing to view/update/create expense transactions on an employee's behalf. Employees and Managers have the ability to Authorize Expense Users/Delegate Entry Authority for their User ID only through the Expenses self-service portal. Administrators may also need to access this same functionality for all User IDs through the Core system. Administrators can Authorize Expense Users and Delegate Entry Authority through the Core system for all User IDs. Occasionally, an administrator may need to intercede and add/update authorized users for an employee. Careful consideration should be given when an administrator performs this kind of update, as this will change who has access to enter/view expense transactions on behalf of the employee.
Security Role	BOR PeopleSoft Role / BOR_EX_ADMINISTRATION
Dependencies/ Constraints	None
Additional Information	None

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Procedure

Below are step-by-step instructions on how to add an authorized user to enter expense transactions for another user.

Step	Action
1.	Click the **Travel and Expenses** link.
2.	Click the **Manage Expenses Security** link.
3.	Click the **Authorize Expense Users** link.
4.	If you know the **Employee ID**, you can enter it directly into the search field. If not, you can search for all Employee IDs without entering any search criteria.
5.	Click the **Search** button.
6.	Click an entry in the **Employee ID** column.
7.	The list of authorized users is usually compromised of the traveler's User ID, as well as Administrative Assistants, and others who may typically enter expense transactions on behalf of the traveler. Your institution may select centralized personnel, such as AP Clerks, who should also be included as an authorized user.
8.	Next, we will add a User ID to this list.
9.	Click the **Add a new row** button at the end of the last row.
10.	Click the **Authorized User ID** button.
11.	Click an entry in the **User ID** column.
12.	The new UserID you selected should be displayed on the **Authorize Users** page.
13.	Under the Authorization level column you can choose between giving the delegate the authority to edit or view only.
14.	Click the **Save** button.
15.	Click the **OK** button.